



# Drupal 7 Quick Reference Guide

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## Reference Guide

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## Reference Guide

### Add Content Tab... general description of standard available content types

**Blog Entry:** Similar to a Free-Form document, but blog posts accept comments by default.

**Bulletin Item:** Bulletin items are linked images with captions that generally display in slideshows.

**Event:** Events appear in calendar displays.

**FAQ:** A frequently asked question and its answer.

**Free-Form Document:** Use free-form documents for static content within departments/boards, such as an 'About us' page.

**Link:** Links are generally used for linking to external sites within menus.

**Meeting Agenda:** Meeting agendas may consist of individual agenda items entered directly into a text area or be a link to a file.

**Meeting Minutes:** Meeting minutes may be entered directly into a text area or consist of a simple linked file.

**News or Announcement:** News is displayed from most recent to least recent and is often featured on department home pages.

**Person Profile:** Person profiles are used to generate contact lists for staff and board members.

**Private File:** Access to private files may be restricted. Private files do not show up in search engine results.

**Slideshow / Gallery:** A slideshow/gallery is a collection of images. Unlike bulletin items, individual images within a slideshow may not be linked.

**Upload File:** Files may be linked to directly in menus.

**Urgent Alert:** Urgent alerts may display on the home page or department/board home pages to notify visitors of time-sensitive information such as closings, or inclement weather warnings.

**Webform:** Webforms are a form or questionnaire accessible to site visitors and users. Submission results and statistics are recorded and accessible to privileged users.

### ▲ Create Content

- Blog Entry
- Bulletin Item
- Event
- FAQ
- Free-form Document
- Link
- Meeting Agenda
- Meeting Minutes
- News or Announcement
- Person Profile
- Private File
- Slideshow/Gallery
- Upload File
- Urgent Alert
- Webform

## Reference Guide

Events... appear on the calendar display

Create Event

Save and Close

Cancel

Event \*

Display options

Embed Video

Address

Groups \*

Navigation Settings

Revision information  
New revision

URL path settings  
Automatic alias

Comment settings  
Closed

Printer, email and PDF versions

Scheduling options  
Not scheduled

Meta tags  
Using defaults

Authoring information  
By Ishuster

Publishing options  
Published

Title \*

Event type \*

- Select a value -

EVENT DATE \*

☐ All Day
 ☐ Show End Date

Date

Time

07/21/2016

09:38am

E.g., 07/21/2016

E.g., 09:38am

☐ Repeat

Image

Choose File

No file chosen

Upload

The image title text will appear as the image caption on the full content view.  
Files must be less than **100 MB**.  
Allowed file types: **png gif jpg jpeg**.  
Images must be between **90x90** and **1200x1200** pixels.

Body

B

I

U

Format

Font

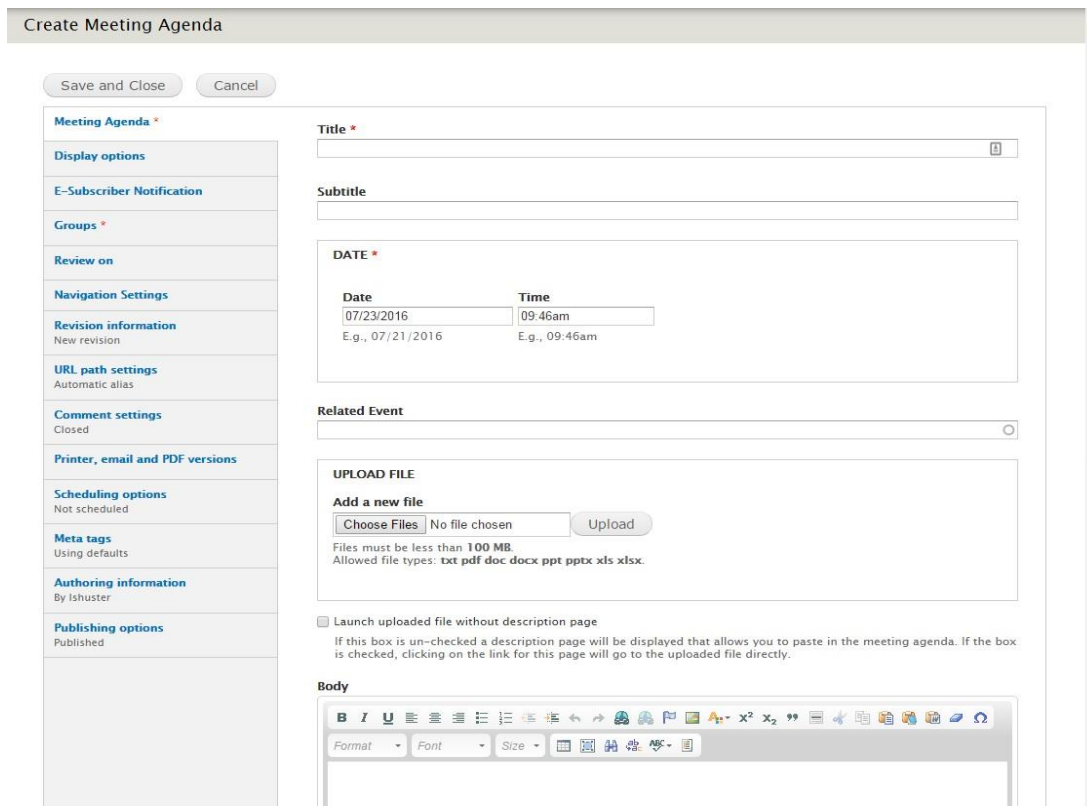
Size

- Create Content -> Create Event
- Title for the Event
  - Be as specific as possible ( i.e. Board of Selectmen Meeting vs. Selectmen Meeting)
- Choose Event Type from drop down menu
- Event Date- This is where the Event date(s) is chosen.
  - All Day: Uncheck if event is not all day. Check off if it is.
  - Show End Date: Uncheck if event is only one day with no end time. Check off if event has an end time, and/or event spans multiple days.
- Body- This is where text is entered for the Event. Text can be edited using the Edit toolbar in the Body field, similar to a Microsoft Word document.

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- All events are automatically set to show up on their respective Department page, and the Town homepage calendar. To NOT display event on the town calendar, go to the Display Options tab and check off Do Not Display on Town Calendar.
- Save & Close

**Meeting Agenda...** may consist of individual agenda items or be a link to a file.



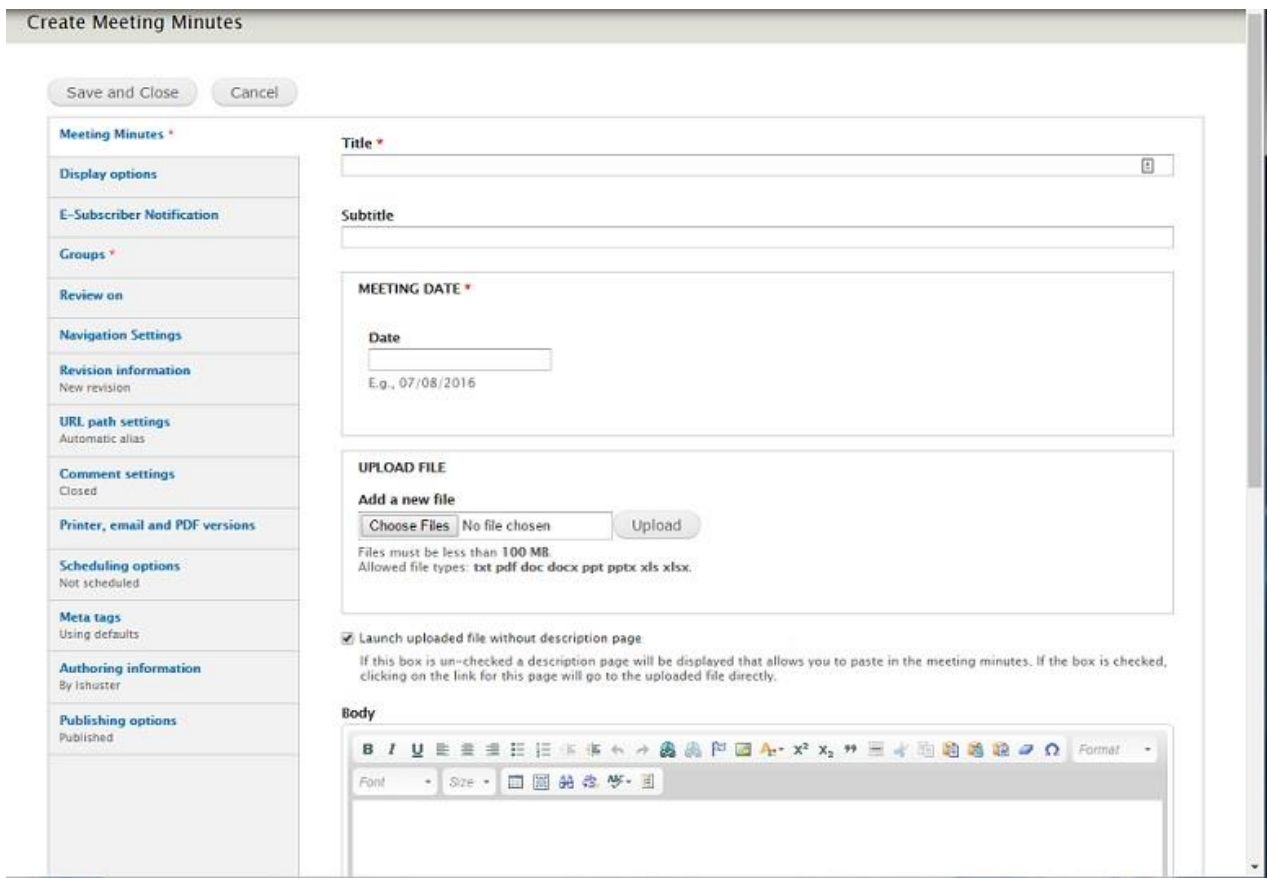
- Create Content -> Create Meeting Agenda
- Enter a Title for the Meeting Agenda ( ie: Board of Selectmen Agenda)
- The Date should be the date of the Meeting, the Time should be the Meeting start time
  - Start typing in the Date field, a small calendar will pop up to select a date from.
- Related Event- This is an auto-complete field. Start typing the name of an event created on the calendar and it will show you a list of potential matches
  - Linking the Meeting Agenda to its respective Event allows the site user to easily access information on the Agenda and Event

*Two Ways to Upload Meeting Agenda*

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- Upload File – select Choose Files to select the Meeting Agenda PDF or Document from Computer, and select file, click Open. Upload File window will be closed now. Click Upload button to upload file to the website.
  - CHECK 'Launch uploaded file without description'
- If copying and pasting the text from a word document, highlight all text in the Word Document, right-click to copy. Go back to the Create Meeting Agenda page, and paste the text inside the Body field.
  - UNCHECK 'Launch uploaded file without description'
- Save & Close

**Meeting Minutes...** may be entered directly into a text area or consist of a simple linked file.



Create Meeting Minutes

Save and Close Cancel

Meeting Minutes \*

Display options

E-Subscriber Notification

Groups \*

Review on

Navigation Settings

Revision information  
New revision

URL path settings  
Automatic alias

Comment settings  
Closed

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Scheduling options  
Not scheduled

Meta tags  
Using defaults

Authoring information  
By Ishuster

Publishing options  
Published

Title \*

Subtitle

MEETING DATE \*

Date  
E.g., 07/08/2016

UPLOAD FILE

Add a new file

Choose Files No file chosen Upload

Files must be less than 100 MB.  
Allowed file types: txt pdf doc docx ppt pptx xls xlsx.

☒ Launch uploaded file without description page  
If this box is un-checked a description page will be displayed that allows you to paste in the meeting minutes. If the box is checked, clicking on the link for this page will go to the uploaded file directly.

Body

B I U [Rich Text Editor Icons]

- Create Content-> Create Meeting Minutes
- Enter a Title for the Meeting Minutes
- The Meeting Date field should be the date the meeting was held.

- ## Two Ways to Upload Meeting Minutes

- Upload File – select Choose Files to select the Meeting Minutes PDF or Document from your Computer, and select your file, click Open. Upload File window will be closed now. Click Upload button to upload file to the website.
  - CHECK ‘Launch uploaded file without description’
- If you are copying and pasting the text from a word document, highlight all text in the Word Document, right-click to copy. Go back to the Create Meeting Minutes page, and paste the text inside the Body field.
  - UNCHECK ‘Launch uploaded file without description’
- Save & Close

**Upload File...** may be linked to directly in menus, free form documents.

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- Title: Enter title for the file being uploaded
- Upload File: Click Choose File, select the file then click Upload.
- Allowed file types are listed below the Upload File field
  - txt, pdf, doc, docx, ppt, pptx, xls, xlsx, xlt, jpg, gif, png, bmp, tiff and csv
  - File must be less than 50 MB
- Add To Downloadable Forms: Check this if file is to appear in list on Downloadable Forms, normally found linked on the websites homepage, Downloadable Forms page is typically called Forms and Documents or something similar.

### Display Options tab

- Add To Persistent Links: Checking this box adds a link to the webpage of the department or board left sidebar navigation. Leaving box unchecked does not add a link to the left navigation.
- Open URL in New Window: Checking this box opens the webpage in a new tab on your internet browser.

## Link File in Free-Form Document

- There are two basic parts in adding a hyperlink in a free form document
  - Upload the File – See above for instructions
  - Once file is uploaded, file can be successfully linked in free form document.
- Find Path for uploaded file in the Department homepage Cabinet. Copy the Path URL
- Open the Free-Form Document, select and highlight the text that will be hyperlinked.
- While the text is left highlighted, In the Edit toolbar, select the Link option (  )
- In the Link window, paste the copied Path in the URL field. OK
- Save & Close

**Create a Bulletin Item...** are linked images with captions that generally display in slideshows.



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Create Bulletin Item

Save and Close Cancel

**Bulletin Item \***

Display options

Add Tag(s)

Groups \*

Review on

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Authoring information  
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Publishing options  
Published

**Title \***

**Image \***

Choose File No file chosen Upload

Since these bulletin items may span the full width of the content (minus a single sidebar), the minimum width is 800px. Files must be less than **100 MB**. Allowed file types: **png gif jpg jpeg**. Images must be larger than **800x400** pixels.

**Image caption heading**

Appended at the beginning of the image caption in overlays. Maximum length: 50 characters.

**Image caption**


Only the first 160 characters will display in a slideshow overlay.

**Link to**

☐ Open URL in a New Window

Internal or external link to which this Slide/Bulletin should link.

**Body**



- Give the Bulletin Item a title
- Image: Choose File to select and upload an image for the Bulletin Item
  - Image will be displayed prominently on the page
- If Bulletin Item will link somewhere when clicked, be sure to put the URL Path in the Link To field.
- Add any text for the Bulletin Item in the Body field
- Save & Close

displayed from most recent to least recent and is often featured on department home pages.

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### Create News or Announcement...

#### Create News or Announcement

Save and Close Preview Cancel

[News or Announcement](#)

Display options
Embed Video
E-Subscriber Notification
Groups
Review on
File attachments
Navigation Settings
Revision information
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Comment settings
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URL path settings
Automatic alias
Scheduling options
Not scheduled
Meta tags
Using defaults
Authoring information
By Ishuster
Publishing options
Published

**Title \***

**Subtitle**

**Image**

Choose File No file chosen Upload

The image title text will appear as the image caption on the full content view.  
Files must be less than **100 MB**.  
Allowed file types: **png gif jpg jpeg**.  
Images must be between **90x90** and **1200x1200** pixels.

**Body**

B I U

Normal Font Size

- Title: Enter a title for the News/Announcement
- Image: Feel free to attach an image by Choosing File, and uploading
- Body: This is where you either type or paste the news text.
  - This is visible when the News/Announcement link is clicked through
- Adding File Attachments: Choose File to upload in the File Attachments tab on the left sidebar
- If you would like to publish/Unpublish the News/Announcement with a specific date range, go to the Scheduling Options tab on the left sidebar.

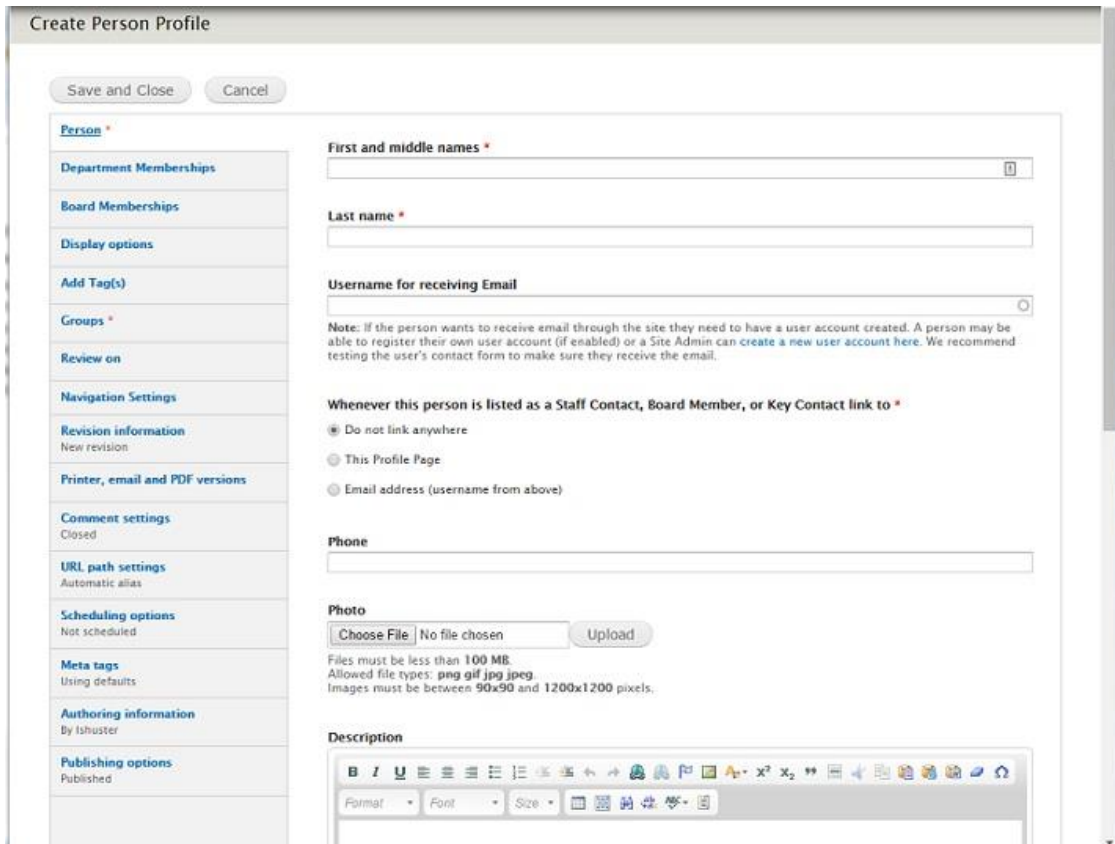
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### Person Profile vs. User Account... What's the Difference?

**Person Profile:** A person profile is created when a person needs to be listed on a Department, Board, or Committee page, with no email address. If the person plans to be contacted through the website or plans to maintain any website pages, they need to have a User Account created as well.

**User Account:** A User Account is created by a Site Admin when a person needs to receive email through the website when listed in a Board or Staff Table, and used to grant a person permission roles to maintain the website.

### Create a Person Profile... that is used to generate contact lists for staff and board members



- Create Content -> Person Profile
- Enter the persons First and Last name
- Enter the Username for receiving email ( See Create User Account for instructions)
- If the person is a member of a Department or Board, go to the respective tab on the left sidebar.
  - Select the Department/Board from the Drop Down menu, and fill in the appropriate details.
    - Add Another Item if member of more than one Department/Board

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- Save & Close

### Miscellaneous Tips & Tricks

**The Cabinet:** Every Department, Board & Committee Homepage has a Cabinet tab. When the Cabinet is opened, the listing of all items that belong to that Department, Board or Committee is displayed. The Cabinet includes blog entries, bulletins, FAQs, links, files, free-form documents, etc.



- Content can be sorted by Type from the Drop-Down Menu. Content can also be sorted alphabetically by the Cabinet header ( Title, Type, Path, Last Updated etc)
- Publish and Unpublish: Clicking Publish will place the page on the website. Clicking Unpublish will remove the page from being published on the website, thus not visible by site visitors
- Edit: Will take you directly to the Edit page for that Item

**What is a Persistent Link:** When Persistent Link field is checked off, the item appears on the left hand sidebar of the Department/Board/Committee Homepage. When left unchecked, the item does not appear on the left hand sidebar.

☒ Add to persistent links

Check here to automatically generate a menu item for this node in its respective group(s).

**Permission Roles:** When a User Account is created, the user will be assigned one (or more) of the following roles. The role assigned determines the site editing permissions for the user.

- Site Admin- Highest level for permissions. User has permission to edit/update throughout the entire website; not limited to one department/board
- Twitter User- Group Admins who want to authenticate their Twitter account through the website, and have the capability to post content to Twitter.
- VTS Support- VTS Support role, can only be assigned to VTS Personal
- Group Member – Editing privileges only for assigned department/board, not site-wide.

**Color Code Calendar Events:** Feature can only be accessed by Site Admins.

In the Admin Bar, go to:

Configuration -> User Interface -> Calendar Colors

Find the department needed and click on the field box below it. Select the color by clicking around on the outer colored ring. Then specify the color shade in the color

Town Clerk



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square located inside the colored ring. Click 'Submit' on button of page to save.

**Imbedding I-frames:** Imbedding I-frames is something that can be done by VTS Support as it involves creating a content block, a feature that is implemented only by VTS Staff.

**Subscribe/Report feature:** Site Admins can view a Subscriber Report of all e-subscribers by adding subscribe/report to the website URL (www.mytown.com/subscribe/report)

**When to use Private File feature:** Use the Private File feature when a file needs to be uploaded to a private department/board on the website. Search Engines do not list Private Files in their Search Results.

**Launch Item Without Description:** This checkbox field is found when you are uploading a file, creating an event, uploading Meeting Minutes, uploading Meeting Agenda.

☐ Launch uploaded file without description page

If this box is un-checked a description page will be displayed that allows you to paste in the meeting minutes. If the box is checked, clicking on the link for this page will go to the uploaded file directly.

- Checking off the Launch Item Without Description checkbox means that when the link to the page is clicked on, the site visitor is taken directly to the PDF/Doc that had been uploaded.
- If the Launch Item Without Description field is unchecked, the site visitor is brought to a page with a link to the uploaded item, that displays any text added to the Body field when editing the Item.